

INTRODUCTION

This document is the Strategic Plan for the California Workforce Investment Board (State Board) for the fiscal year 2002-2003. ***The purpose of this Strategic Plan is to provide a practical roadmap for action for the State Board and staff.*** This plan is the Board's work plan for the coming year in fulfilling its statutory obligations to:

- Support the implementation of *California's Five Year Plan for Title I of the Workforce Investment Act of 1998 and the Wagner-Peyser Act* (federally mandated by the Workforce Investment Act (WIA) of 1998), and
- Provide overall guidance to the State's workforce development system.

The State Board defines workforce development as education and workforce preparation linked to economic development. California's workforce development system is composed of the institutions and programs by which people are educated, trained, and retrained for employment and participation in the labor force. Included are all segments of the system - from K-12 education and postsecondary institutions such as community colleges and four-year institutions - to public and private sector training programs and the workforce activities of labor and community-based organizations (Stephen Levy, *Shared Prosperity and the California Economy*).

California's workforce development system must provide its customers – employers and workers – with the information and services they need to obtain education, training and skills upgrading responsive to the career opportunities and industry requirements of today's and tomorrow's competitive global economy. The State Board recognizes the diversity of community needs, and of local and regional responsibility for systems to meet these unique needs.

The State Board's role is to develop and promote the *policies* necessary to facilitate statewide system-building and support local system-building, while its partners – chief elected officials, Local Workforce Investment Boards (LWIBs), One-Stop Career Center operators, training providers and others – are responsible for *local system-building, program outcomes and performance*.

This Strategic Plan sets overall policy direction for the work of the State Board. The Plan was developed through a new process that began with a Strategic Planning Seminar, held by the State Board in February 2002 at Stanford University (see Seminar Proceedings-- *Investing in the California Workforce of Tomorrow* – www.calwia.org).

A working group of State Board members, led by the Board Chair and supported by staff and consultants, developed the Plan based on priorities developed during the Seminar. It identifies five specific high-priority goals and actions to make measurable progress toward those goals over the coming year. The five strategic goals are:

- 1. To ensure that all partners have the most timely, relevant information about changing workforce needs and investment opportunities.***
- 2. To be an effective partner and advocate, and bring system partners together.***
- 3. To create, nurture and reward a culture of innovation.***
- 4. To raise the quality of the “field of Practice” and performance of the overall workforce development system.***
- 5. To ensure administrative excellence, including compliance with WIA requirements, to support achievement of all strategic goals.***

This Strategic Plan is meant to be a dynamic document – a work in progress – to be reviewed and revised on an ongoing basis as circumstances warrant. It will be used to inform staff planning and day-to-day management and operations. The current work of the State Board and staff will be aligned to support the implementation of this Plan. It is expected that the State Board will reconvene early in 2003 to review progress in accomplishing goals and begin the strategic planning process for the next fiscal year.

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I. BACKGROUND

The California Workforce Investment Board

In August 1998 the U.S. Congress passed the Workforce Investment Act (WIA) to replace the Job Training Partnership Act (JTPA) beginning July 1, 2000. The Act implemented major reforms in the nation's job training system, and provided guidance for statewide workforce investment systems to increase the employment, retention and earnings of participants. With a strong emphasis on private sector involvement, customer service, and better alignment of public sector resources, the system is intended to help both workers and businesses compete and succeed in the challenging global economy.

In October 1999, Governor Gray Davis issued an Executive Order appointing members to the California Workforce Investment Board (State Board) to guide the State's implementation of WIA. The State Board, which includes State and local policy makers and key business leaders, provides policy recommendations to the Governor regarding all aspects of WIA implementation, including provision of integrated services and program accountability. It is also responsible for establishing the vision and goals for California's overall workforce investment system (See Appendix 1 for current list of Board members and industry sector representation).

During 2000, the State Board adopted *California's Five Year Plan for Title I of the Workforce Investment Act of 1998 and the Wagner-Peyser Act*. This plan is required under law and is submitted to the U.S. Department of Labor. During 2001, the State Board was actively engaged in a number of initiatives to accomplish its goal of building a comprehensive workforce development system – both to sustain California's economic prosperity and to provide workers with the skills they need to participate in this prosperity.

Coming to the end of the complex transition phase from JTPA to WIA in 2001, and faced with new challenges from the slowing economy, the State Board sought to step back and reflect on the most strategic way to conduct its work in the upcoming year. This process was further impacted by shifting priorities and needs resulting from the events of September 11, 2001.

The Governor's Proposal to create a Labor and Workforce Development Agency has added new dimensions and opportunities in considering the State Board's role and ability to impact workforce development. As the Governor noted in his proposal, the State currently has multi-billion dollar job training programs administered by a number of state agencies, and these programs need to be more effectively integrated into the new federally-mandated workforce development system created by WIA, with the State Board overseeing California's implementation of the new system. The recent launching of the California State Youth Council and its technical assistance arm, the Youth Council Institute, is another opportunity to energize system partners, who are working to create an

“All Youth One System” framework to serve the education and workforce preparation needs of youth.

The State Board Strategic Plan

The February Strategic Planning Seminar provided a new knowledge base for thinking about how the State Board could best add value in building an effective workforce development system that serves all Californians, businesses and communities. Based on the discussion of strategic priorities, possible actions and next steps, the State Board developed a framework for a Strategic Plan, upon which this document is based.

At the same time, a great deal of work has occurred since the beginning of the year regarding the proposed Labor and Workforce Development Agency and the reorganization of the State’s workforce development functions. Activities have included legislative hearings, stakeholder convenings and analysis of training programs by the Governor’s Workforce Development Task Force, and a hearing and organizational analysis by the Little Hoover Commission.

The State Board’s Strategic Plan also seeks to capitalize on the key areas of opportunity cited in the Little Hoover Commission’s Report *Only a Beginning: The Proposed Labor and Workforce Development Agency* (2002), namely that the State Board:

- Can increase its potential as a business-led advisory group that defines standards, advocates for improved performance, and documents both progress and shortcomings of the workforce development system.
- Has the ability to be a forceful venue for developing a policy agenda.
- Has the greatest potential to unite the efforts of the State’s many disparate job training programs so that local agencies can better serve their communities, including linkage with key employers and regional industry sectors.

Several important policy issues are on the horizon for the coming year in light of the federal reauthorization in 2003 of workforce development, education and welfare reform legislation. The outcomes of this reauthorization will affect the implementation of the State’s workforce development strategies. ***The Board’s Strategic Plan needs to provide both structure and flexibility in dealing with its ongoing responsibilities and emerging federal, state and local issues.***

The Strategic Plan articulates what the State Board will do to improve California’s workforce development system, in collaboration with its administering entity, the Employment Development Department (EDD) and its many other partners. The Plan describes how the State Board will organize itself to accomplish its five strategic goals, supported by the State Board staff. According to the priorities developed by the Board, its value-added role will be to improve system inputs and outcomes by committing to:

- **Ensure that all partners have the most timely, relevant information** about changing workforce needs and investment opportunities, at the local, regional and statewide levels;
- **Be an effective partner and advocate**, bringing system partners together for the benefit of the entire workforce development system;
- **Support, nurture and reward a “culture of innovation,”** both through its own investments and by leveraging the resources of other partners;
- **Raise the quality of the “field of practice” and performance** of the overall system; and
- **Ensure administrative excellence**, including timely compliance with WIA requirements, to support the accomplishment of all strategic goals.

This approach recognizes that the State Board’s role is not to deliver services or manage agencies. Rather, it is to use its influence and leverage through its policy role to help define the broader goals of the overall system in achieving success, to work with its partners to achieve this success, and to hold all parties - itself included - accountable for achieving success.

The remainder of the Strategic Plan document is organized as follows:

- I. Vision for Workforce Development and Investment, including shared aspirations for workforce “success”
- II. Strategic Goals – the priorities for State Board action
- III. Priority Actions and Implementation Tasks – the details of the work plan
- IV. Organizing Ourselves to Move Forward - implementation responsibilities and timelines
- V. Appendices

II. VISION AND MISSION FOR WORKFORCE DEVELOPMENT AND INVESTMENT IN CALIFORNIA

Vision

The California Workforce Investment Board adopted the following Vision Statement in December 2000:

“In order to achieve sustainable economic growth, meet the demands of global competition in the modern economy, and improve the quality of life of all Californians, California shall have a comprehensive workforce development system of education and workforce preparation linked to economic development that sets the standard for the nation and the world.”

In February 2002, the State Board elaborated on this vision by identifying its aspiration for the success of the overall workforce investment system five years from today. State Board members shared these aspirations:

- Workforce development and investment is a central means to increase widely-shared economic opportunity, wages, productivity, home ownership—in short, upward mobility for all Californians.
- Workforce development and investment is a central means to decrease poverty, income inequality, and our reliance on imported skilled labor as a substitute for preparing California’s diverse, talented, and motivated population for economic opportunity.
- Workforce development and investment to prepare a world-class labor force is essential to the overall competitiveness, innovation, and leadership position of the California economy.

These aspirations are far broader than the impact of WIA programs. They reflect the commitment of the State Board to the idea that the State’s workforce development resources, policies, and activities have the greatest possible return on investment, and that the State Board has a leadership role in making this happen.

Mission of the California Workforce Investment Board

As noted in the Introduction, there are many participants in California's workforce development system at the local, regional and state levels. However, the California Workforce Investment Board is in a unique position to promote the **overall** success of the system. Thus, the State Board's mission is:

To provide strong leadership in achieving the success of the overall workforce development system, for the benefit of all California – its people, businesses and communities.

To accomplish its mission, the State Board will be guided by the following shared beliefs:

- We believe that our full scope must be the entire workforce development and investment system in California – not just activities funded by the federal Workforce Investment Act.
- We believe that our unique role in workforce development and investment is to lead by informing and leveraging action, not by delivering services or managing categorical programs.
- We believe that our support role is to help our partners serve the system's primary customers - the people, employers and communities of California – with the State Board helping to forge productive, lasting relationships among them.
- We believe that our biggest investment opportunity lies in ensuring that people have the skills to move into and through career progressions that create a rising standard of living and keep the California economy innovative and prosperous.
- We believe that our focus for investment strategies must be local, regional and statewide - for California is a state of diverse regional economies and labor markets, but there are also common needs requiring broader collaborative action.
- We believe that our State should be among the national pace-setters in workforce development—as we traditionally have been—settling for nothing less than the development of a world-class workforce investment system for our people and employers.
- We believe that our long-term success resides in improving the quality of life, with opportunities for all Californians to participate in this success.

III. STRATEGIC GOALS

The ongoing success of California’s workforce development system depends on the quality of its inputs, operations, and outcomes. The State Board will improve the quality in each of these areas by making measurable progress towards achieving five high-priority goals:

- 1. To ensure that all partners have the most timely, relevant information about changing workforce needs and investment opportunities.***
- 2. To be an effective partner and advocate, and bring system partners together.***
- 3. To create, nurture and reward a culture of innovation.***
- 4. To raise the quality of the “field of practice” and performance of the overall workforce development system.***
- 5. To ensure administrative excellence, including compliance with WIA requirements, to support achievement of all strategic goals.***

The following sections present background for each of these goal areas and describe the strategies and actions the Board will implement to accomplish these goals. Figure 1 at the conclusion of this section summarizes the State Board’s framework for the Plan.

Strategic Goal 1. To ensure that all the partners have the most timely, relevant information about changing workforce needs and investment opportunities.

The State Board will improve system “inputs” by ensuring that all participants (people, firms, education and training institutions, and others) have the best, most forward-looking information about changing regional economies and labor markets—as well as insights into relevant technology, market, and demographic trends.

The fast-moving nature of the California economy makes it difficult for system partners to keep pace. The best way to improve the quality of information about emerging trends and needs is to learn about changing conditions more quickly and comprehensively from California employers. To “sense” changes as they are happening will require a new mechanism among employers and between employers and the rest of the system.

In addition, there is much that can be done to maximize the value of existing labor market information collected by state government – from packaging the data in more useful ways, to doing further customer-driven research that identifies demand occupations, skill requirements and career progressions. At present, there are many barriers to data acquisition from the local level, and difficulties in linking labor market and economic

information to meet “real-time” needs. The State Board has a statutory responsibility under WIA to develop the statewide employment statistics system.

The State Board will help build the necessary foundation for better planning, investment and implementation throughout the system in the following ways:

- Bring the knowledge and understanding of the employer community to the table.
- Develop and disseminate excellent, market-driven economic, labor and other information.
- Provide direction for the State’s research agenda on economic and labor market issues, in collaboration with the new Agency Secretary and the California Economic Strategy Panel.
- Provide the policy forum to examine the critical issues facing the workforce system.
- Recommend policies to improve information access, guide funding investments strategically, and address critical issues.

Over the next year, the State Board will use its ability to connect with employers by creating systematic ways to gain information from them, and assess and report out their views about emerging trends. It will also act as a “listening post” to identify and raise issues affecting the overall workforce investment system. The State Board’s Small Business Workgroup and the Farmworkers Workgroup are examples of playing this role.

The State Board, with administrative support to be provided by Employment Development Department/Labor Market Information Division, has just entered into an interagency agreement with the Technology Trade and Commerce Agency to develop updated regional economic base analyses, perform industry cluster and cross-regional economic and labor studies, and assist the State Board with the publication of a monograph series on California Labor and Economy Issues. The topics will be based on new information and findings that emanate from the research efforts, and issues identified by the members of the State Board through its employer outreach and “listening” efforts.

Strategic Goal #2. To be an Effective Partner and Advocate, and Bring System Partners Together.

The State Board will improve the workforce development system by ensuring that collaboration becomes standard operating procedure—that different organizations and levels within the system can connect easily and work together effectively, and are working from a shared system-wide vision. The State Board strongly desires that partners at both the State and local levels move beyond categorical program/silo thinking and funding, and work together to build a comprehensive workforce development system.

Many policy reports have ascertained that the fragmented State system continues to impede the success of local program performance, and that there is an inadequate linkage between workforce and economic systems. Several have noted recently that the State Board has the greatest potential to address these issues.

The State Board can also have an impact by assisting the local WIBs and One-Stops in their efforts to improve planning and implementation (service delivery). Targeted areas of need identified at the Strategic Planning Seminar include: 1) helping local WIBs identify and recruit employers in key regional industry sectors, and 2) helping improve the effectiveness of the State system of One-Stops, including the adoption of best practices and marketing to make customers (especially employers) more aware of the system.

The State Board will help to create an environment conducive to collaboration and better performance in meeting California's workforce needs in the following ways:

- Guide the development of a shared vision for the workforce development system's success.
- Partner to redefine the State's overall Five-Year Workforce Development Plan, with a broadened scope ("beyond WIA").
- Reward collaboration in planning and implementation.
- Solve problems, in particular by helping to identify and remove barriers, especially at the State level, to assist the local partners.
- Advocate for the overall system, brokering agreements to focus and align resources, and leveraging resources from within and outside of the system to support the partners.

The mechanism for expanding collaboration and the commitment of the partners to achieving broad system goals will begin with a reworking of the State's five-year WIA Development Plan. The updated plan will include a WIA compliance plan as one element, but not as the sole focus, of the State's Five-Year Workforce Development Plan.

During the coming year, the State Board will create a prototype of a new system-wide planning process that develops a shared vision and system design, identifies clear outcomes, and identifies specific actions to (1) overcome barriers to collaboration and (2) align and leverage resources toward common goals. Through this process, other workforce plans (e.g., the Perkins Plan) will be reviewed and integrated with the Five-Year State Plan. This updated plan will be the practical document for improved system performance.

The State Board has several vehicles for partner coordination and collaboration, including the State Youth Council and Youth Council Institute, interagency agreements with the Community Colleges and the Department of Education, the Performance Based Accountability Committee, workgroups with diverse representation, and federal and large-state relationships (see Appendix 2 for a list of activities and participants). In addition, this process will include outreach to actively engage employer and business

groups, labor, economic development entities, and collaborative industry cluster partnerships.

The State Board will also assist local WIBs with filling gaps in Board composition around key regional economic sectors, and with improving the engagement of the private sector. The process for certifying local boards will include support for local boards in their work with local chambers of commerce, economic development organizations, and other employer groups. The State Board will improve the effectiveness of the State's network of One-Stop Career Centers, especially through proactive marketing and outreach.

Strategic Goal #3. To Create, Nurture and Reward a Culture of Innovation.

The State Board will improve system operations by ensuring that new approaches are actively encouraged and rewarded, with both successes and lessons learned – including learning from our “failures” - being shared widely. Several of the State Board Workgroups, such as Universal Access and those for special populations, already have as a core focus the identification and promotion of new models and best practices.

Building on its experience with developing a program for the Governor's WIA 15 Percent Discretionary Funds, the State Board will help create an ongoing culture of innovation and learning within the overall workforce system in the following ways:

- Define clearly what is meant by “innovation,” both in incentive fund projects and other types of projects including day-to-day program operations.
- Spotlight and document best practices, including those within and outside of California through research, convening, information dissemination and creation of an ongoing “learning network” among the State Board's and partners' grantees.
- Target funds for innovation, in accordance with clear criteria.
- Leverage funds, including those from foundations and other system partners, to support overall system innovations.

Using its experience with the 15 Percent Discretionary Funds, the State Board will develop the conceptual innovation investment framework for an incentive fund, in order to define innovation (i.e., breakthrough thinking and action), set investment criteria and priorities, determine proposal solicitation and review procedures, and develop an investment plan. It will also incorporate the findings of a forthcoming evaluation of 15 Percent WIA discretionary projects, and move forward on leveraging, research, convenings, and information dissemination. In coordination with its partners, the State Board will leverage resources, including technical assistance and mentoring, for those interested in replicating innovative models.

The “learnings” from this work will be helpful in supporting the adoption of innovation strategies with other WIA funding at the local level and with resources such as the Employment Training Panel, California Department of Education, and Community Colleges funding.

Strategic Goal # 4. To Raise the Quality of the “Field of Practice” and Performance of the Overall Workforce Development System.

The State Board will improve overall system outcomes by helping to set the standards for defining, measuring, and achieving meaningful progress in workforce investment in California (Return on Investment), and helping everyone do better with the practice of measurement and performance. At the Strategic Planning Seminar, progress was considered in the broad sense of improving quality of life through an improved standard of living.

At present, WIA requires that States and Local Workforce Investment Areas meet 17 specific performance goals (see Appendix 3). Overall, California has performed well, although challenges remain in meeting a few of the measures. In addition, there is a Performance Based Accountability (PBA) system, created by state legislation and staffed by the State Board, that is an interagency process measuring the outcomes of participants in California’s diverse education and workforce preparation programs (see Appendix 4 for a description).

While the State Board supports improvements in these practices and outcomes, it strongly desires to focus on the performance of the overall system, rather than on categorical programs, in meeting the needs of local communities and regional economies. The State Board will assist in the performance and measurement of the overall system in the following ways:

- Define clearly the goals for the overall workforce system, in collaboration with the partners.
- Provide clear statewide expectations and assistance to others in developing quality measures for both WIA and the overall system at the local and regional levels, and establish clear compliance policies.
- Ensure that quality measures (metrics) are developed and embraced by all participants at all levels, and that the right outcomes are being measured.
- Improve the use of the measurement systems.
- Develop an incentive program to reward high performance.
- Promote technical assistance to improve performance.

Over the next year, the Performance Based Accountability (PBA) Committee will have a broader mandate to develop and propose standards for measures of system success. In addition, the Committee will develop a benchmark of system measurements using information from around the nation to determine best and most innovative approaches.

The State Board will also ensure that the research and development findings of its own work and that of others, like the forthcoming evaluations of the Regional Workforce Preparation and Economic Development Act and WIA implementation, will be widely disseminated, discussed and built upon as part of the practicum of learning about performance measurement and evaluation (as well as best practices for innovation). Technical assistance will be promoted to help system partners adopt new approaches.

Based on articulating clear compliance expectations for WIA, the State Board will assess performance, reward high performance, and develop strategies to address under-performance, including provision of technical assistance and mentoring, with implementation of sanctions used only as a last resort.

Strategic Goal # 5. To ensure administrative excellence, including compliance with WIA requirements, to support achievement of all strategic goals.

The State Board will improve the overall workforce development system by working with the Employment Development Department (EDD) to ensure that all WIA administrative compliance requirements are met in a timely manner. It also will provide the policy direction and work with EDD and others, including the California Workforce Association, to provide technical support at the State and local levels for effective expenditures of funds, as well as program performance that meets the needs of communities, employers and workers, including special populations. This is part of the State Board's statutory responsibilities.

While the State Board seeks the improvement of the overall workforce development system, it embraces WIA as a valuable platform on which to build and leverage this success. Other strategic goals - including collaboration with local partners and raising the overall quality of performance - will be meshed with the oversight of WIA responsibilities and other State Board administrative duties, including strategic planning.

The goal of the State Board is to develop flexible, responsive administrative structures and procedures that enhance efficiencies and performance while putting the Board members' time to the highest and best use. The State Board will improve administrative performance in the following ways:

- Establish an annual process for developing the Board Strategic Plan and evaluating progress towards high-priority goals.
- Create a tracking process to coordinate and meet all WIA compliance requirements and other reporting requirements (evaluations, funding reports, etc).
- Improve standards, policies and procedures to ensure compliance by the local WIBs with WIA requirements.

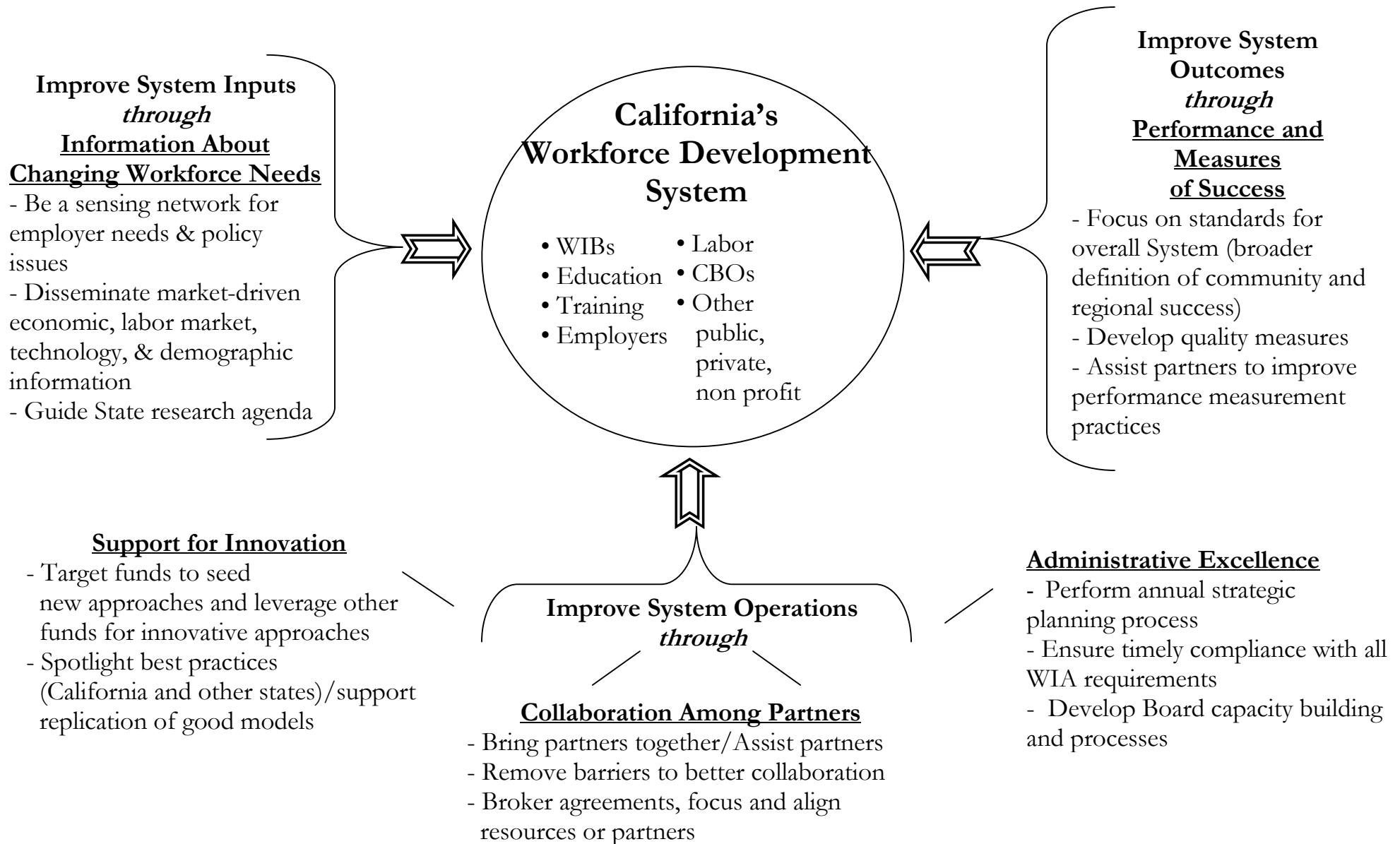
- Update specific policies and processes regarding State Board organizational structure; member selection and composition, orientation, and capacity building; communications and outreach; and meetings schedule.
- Develop a consent calendar process to expedite routine decision-making, reserving precious Board meeting time for discussion of critical policy issues and strategic plan goals.

The State Board has several workgroups that address specific WIA policy and compliance issues, including: Local Area Designation, One-Stop Certification, Universal Access, and Special Populations (Farmworkers and Veterans). These groups include representation from many entities at the State and local levels. Their work will be coordinated through the monitoring and tracking process to be established through implementation of the WIA Oversight and Coordination Workgroup, composed primarily of interagency partners.

The State Board will expand its policies and procedures for administration of its Strategic Plan, Board organizational structure and capacity building, communications and outreach, and support of committees, work groups, and other liaison activities. Building on the efforts of the Board Strategic Planning Team, the State Board will develop procedures for strategic planning, defining outcomes for performance, tracking progress toward strategic goals, and evaluation, as well as organizational issues such as structure and capacity building.

Figure 1 following summarizes what the State Board will do to improve California's Workforce Development System.

Figure 1 What the State Board Will Do to Improve California's Workforce Development System



IV. PRIORITY ACTIONS AND IMPLEMENTATION TASKS

The State Board will pursue a targeted set of actions that will result in measurable progress towards each of the five strategic goals. Each action is to be taken during Fiscal Year 2002-3. The State Board and staff will monitor progress in each area over the course of the year to achieve a set of expected outcomes. The matrix that follows summarizes the priority actions to pursue each goal, with specific tasks to implement the actions.

IMPLEMENTATION MATRIX

Goal	Priority Actions	Expected Outcomes	Implementation Tasks
<i>I. Ensure the most timely, relevant information about changing workforce needs and investment opportunities</i> <i>Board Champions:</i> <hr/> <hr/> <hr/>	A. <u>Develop a “sensing network”</u> among California employers to gather credible information about emerging industry trends and workforce needs.	1. Develop and test a prototype employer survey and sensing network 2. Produce a written synthesis of emerging industry trends and workforce needs	i. Inventory existing research and sources of employer and industry trends. ii. Work with local and regional associations of corporate human resource professions, statewide industry associations, economic development entities, etc. to design simple, uniform workforce data survey that employers can complete quickly. iii. Set up and test prototype network to collect and synthesize employer information on industry trends (and assess first test of the prototype network). iv. Coordinate with Small Business and Farmworker Workgroups, sector economic initiatives (nursing, childcare, etc.) on survey and network. v. Coordinate with California Economic Strategy Panel (ad hoc member on CalWIB and vice versa) on survey and network.
	B. <u>Improve the development and use of labor market information linked to economic development</u> , especially that generated by state government to guide workforce investment in California.	1. Develop a prioritized list of “preferred labor market information products” from state government 2. Define a unified, simplified labor market information system, one that delivers useful, timely, and accurate information to the local and regional levels	i. Work with local WIBs to identify preferred labor market information products, those that contribute most to effective planning and decision-making at the regional and local levels (e.g., a monthly dashboard of workforce indicators). ii. Collaborate with the Labor and Workforce Development Agency on integrating EDD and DIR data, providing perspective on LMID products, and determining the State’s research agenda. iii. Implement interagency agreement work plan of CalWIB/Technology Trade and Commerce Agency, for updated economic base and trend analyses for California regions and industry sectors, and convening of industry sectors, supported by Economic Advisors. iv. Help remove barriers to data acquisition by local WIBs and other partners.

	<p>C. <u>Develop and implement a multi-faceted information dissemination strategy,</u> stimulating and informing policy discussions and innovative training initiatives.</p>	<ol style="list-style-type: none"> 1. Design and implement an issue prioritization process involving the State Board, local WIBs, and other system partners 2. Based on the results of the process, prepare and widely disseminate five policy/issue briefs on priority workforce topics 	<ol style="list-style-type: none"> i. Identify five key workforce issues that cut across regional, cultural, ethnic, and other boundaries. ii. Prepare policy/issue briefs on the key workforce topics, which could include broader, related topics such as housing, transportation, childcare and health care. iii. Proactively disseminate results widely through a variety of mechanisms (e.g., seminars and forums, website, and other state and local exchanges, including local WIB leadership forums convened with CWA).
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<p>II. Be an effective partner and advocate, and bring system partners together (Collaboration)</p> <p>Board Champions:</p> <hr/> <hr/> <hr/>	<p>A. <u>Update and broaden the focus of the State's Five-Year Workforce Development Plan (California's Five-Year Plan for Title I of the Workforce Investment Act of 1998 and the Wagner-Peyser Act)</u> to improve how system partners work together in tangible, measurable ways for overall system success.</p>	<ol style="list-style-type: none"> 1. Complete an updated Five-Year Workforce Development Plan 2. Increase the effectiveness and availability of resources 	<ol style="list-style-type: none"> i. Design a prototype for a new system-wide planning process that develops a shared vision and system design, creates clear outcomes, and a plan for ongoing updates (e.g., define partnership expectations for state agencies, including joint funding of one-stop centers and cross-agency data management). ii. Identify specific actions to (1) overcome barriers to collaboration and (2) align and leverage resources towards common goals. iii. Integrate other workforce planning efforts to create comprehensive development and investment plan iv. Encourage unified regional workforce planning.
	<p>B. <u>Develop and implement an advocacy strategy at the federal level.</u></p>	<ol style="list-style-type: none"> 1. Complete initial advocacy activities at the federal level, especially for the WIA reauthorization process 	<ol style="list-style-type: none"> i. Work with the Governor, local WIBs, and other system partners, as well as large states, the National Governors' Association, and the California congressional delegation to assemble the advocacy strategy, set priorities, and follow-through with specific advocacy activities.
	<p>C. <u>Support local WIBs to fill gaps in Board composition and improve participation,</u> in particular employers in key regional industry sectors.</p>	<ol style="list-style-type: none"> 1. Reach one-year targets for improvement, working closely with local WIBs 	<ol style="list-style-type: none"> i. Analyze regional economies and key industry sectors to provide gap analysis, and improve certification process for local boards. ii. Work with local WIBs to set realistic one-year improvement targets, and then work with help them improve employer participation and fill other gaps in composition, including adequate labor representation. iii. Promote capacity building assistance through local WIBs to local chambers of commerce, EDCs, local elected officials.

	<p>D. <u>Improve the effectiveness of the State system of One-Stops.</u></p>	<ol style="list-style-type: none"> 1. Expand Sate Board member knowledge of local One-Stop operations 2. Design and launch marketing campaign to raise customer awareness of certified One-Stops 	<ol style="list-style-type: none"> i. Research best practices; increase data sharing and information, and outreach and capacity building, including areas such as standardized systems and practices across the State. ii. Support state and local adoption of elements for One-Stop certification to participate in statewide marketing. iii. Update and enhance the One-Stop database with EDD. iv. Identify and help leverage additional resources for system building. v. Develop a statewide marketing campaign to raise awareness of the system and improve market penetration.
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III. Create, Nurture and Reward a Culture of Innovation	A. <u>Design and implement innovation funds and strategies.</u>	1. Develop an overall innovation investment plan for the State Board, and make initial investments.	i. Define innovation, set investment criteria and priorities, and develop investment plans and strategies. ii. Leverage additional innovation resources, including from foundations and other public/private partners.
Board Champions: <hr/> <hr/> <hr/>	B. <u>Support sharing and adoption of best practices.</u>	1. Publish and widely disseminate an annual innovations in workforce development report 2. Complete a process to select and showcase winners of California innovation awards in workforce development	i. Document best practices in both planning and implementation from in and out of state, develop benchmarks, and disseminate information and lessons learned. ii. Incorporate findings from evaluations of 15% discretionary projects and Regional Workforce Preparation and Economic Development Projects. iii. Work with partners to assist locals in adopting successful models, including those for youth development. iv. Create a process for selecting and providing annual innovation awards.

<p><i>IV. Raise the Quality of the “Field of Practice” and Performance of the Overall Workforce Development System</i></p> <p><i>Board Champions:</i></p> <hr/> <hr/> <hr/>	<p>A. <u>Conduct nationwide assessment of measurement practices to determine best innovative approaches.</u></p>	<p>1. Publish and widely disseminate a briefing document on national best practices in measurement</p>	<p>i. Conduct research, develop measurement benchmarks, and disseminate information, focusing on reasonable, community-based performance standards. ii. Promote sustainable models to help system partners adopt new approaches in planning and implementation (unified, regional).</p>
	<p>B. <u>Help build capacity of local WIBs to adopt new measures and practices</u></p>	<p>1. Local WIBs begin to adopt new measures and practices based on national best practices</p>	<p>i. Assist local WIBs, Youth Councils and practitioners in building capacity to implement new approaches.</p>
	<p>C. <u>Set clear standards for measures of system success, both WIA performance and broader system outcomes, including long-term return on investment.</u></p>	<p>1. Identify, publish, and disseminate measures for system success. 2. Advocate at the federal level for relevant community-based performance standards.</p>	<p>i. Clearly define the goals of the overall workforce system, in collaboration with partners, especially local WIBs. ii. Develop measures to match goals, with clear metrics. iii. Use Performance-Based Accountability (PBA) system to expand use of measures, including ability to show continuous improvement. iv. Address data issues. v. Collaborate with the large states, the National Governor’s Association and others to review WIA performance standards as part of the reauthorization process. vi. Work with the US Dept. of Labor to help create more useful performance measures, using the waiver process.</p>
	<p>D. <u>Develop a set of comprehensive and clear WIA compliance policies.</u></p>	<p>1. Develop and issue set of WIA compliance policies</p>	<p>i. Clearly identify and work with EDD to provide technical assistance to address compliance issues. ii. Reward high performance. iii. Implement sanctions as last resort.</p>

<p>V. Ensure administrative excellence, including compliance with WIA requirements, to support achievement of all goals</p> <p>Board Champions:</p> <hr/> <hr/> <hr/>	<p>A. <u>Adopt annual process for developing Board Strategic Plan and evaluating progress towards high-priority goals.</u></p> <p>B. <u>Strengthen partnership between State Board and local WIBs</u></p> <p>C. <u>Update specific Board policies and procedures.</u></p> <p>D. <u>Develop process to track and monitor compliance with WIA requirements.</u></p> <p>E. <u>Develop process for consent calendar.</u></p>	<p>1. Design and conduct an annual Strategic Planning Seminar, resulting in FY 2003-04 Strategic Plan</p> <p>1. Schedule and hold regular meetings and other exchanges between State Board and local WIBs</p> <p>1. Develop and publish Board Members Guide to Policies and Procedures</p> <p>1. Develop and publish a Master Schedule for reporting, compliance, etc.</p> <p>1. Develop and publish Board Meeting Guidelines, including consent calendar process</p>	<p>i. Develop timeline for implementation.</p> <p>ii. Define outcome measures and track progress in meeting FY 2002-2003 goals.</p> <p>iii. Schedule second annual Strategic Planning Seminar (February 2003); develop process for FY 2003-04 plan.</p> <p>i. Identify best opportunities for regular contact between State Board members and local WIB members (e.g., Chair of State Board meeting with local WIB chairs, Board member site visits to local WIBs and One-Stops).</p> <p>ii. Establish regular place on the State Board agenda for reports from the field.</p> <p>i. Revise by-laws, address member composition, terms, leadership transition, recruitment, structure.</p> <p>ii. Develop procedures for orientation, ongoing capacity building, communications and outreach, etc.</p> <p>i. Track and monitor legislation relevant to the State's workforce development system.</p> <p>ii. Develop schedule for timely submittal of reports and compliance documents, coordinate workgroups; improve compliance policies and procedures (see goal #4).</p> <p>i. Expedite workgroup work and other reporting requirements.</p>
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V. ORGANIZING OURSELVES TO MOVE FORWARD

This section of the Strategic Plan presents an overview of how the State Board and staff will be organized to accomplish the five Priority Strategic Goals. Board members will take the lead as “champions” for the accomplishment of each goal, and work with other interested Board members, staff and partners to review and refine the expected outcomes and implementation tasks, identify specific next steps, and finalize timelines for the upcoming year. Much of the work will take place concurrently.

The ongoing work of the Board members and staff is being aligned with the framework of the proposed work plan, and will be coordinated with partners within and outside of the Labor and Workforce Development Agency. This work involves managing and supporting the Youth Council, the Interagency Agreements, and Committees and workgroups that have broad representation of many partners; working with EDD as administering entity; fulfilling reporting requirements to the U.S. Department of Labor and the Legislature; and the ongoing liaison with state agencies, the federal government, the Legislature, local WIBs, and the employer community. Due to the integrative nature of Board and Staff activities, the processes and work products will contribute to the accomplishment of multiple goals.

The following chart illustrates the potential roles of both the State Board and staff:

State Board Functions	Staff Functions
<u>Economic/Workforce Information</u> <ul style="list-style-type: none"> ✓ Board as “listener” to and communicator of business and workforce issues and gaps ✓ Provide forums for dialogue; identify policy issues ✓ Set R&D priorities 	<u>Economic/Workforce Information</u> <ul style="list-style-type: none"> ✓ Coordinate MOU with Technology Trade and Commerce Agency ✓ Support policy briefs/dialogue process ✓ Manage R&D work, including collaboration with LMID, liaison with local WIBs to support sensing network, and integration of workgroups and sector initiatives information ✓ Web site management and information dissemination
<u>Collaboration Among Partners</u> <ul style="list-style-type: none"> ✓ Set shared vision with local WIB counterparts, other system partners, the business community and labor ✓ Review and adopt revised Five-Year Plan ✓ Work with system partners to align actions and resources 	<u>Collaboration Among Partners</u> <ul style="list-style-type: none"> ✓ Develop the prototype planning process with partners ✓ Draft the revised Five-Year Plan and support the planning process ✓ Document needs and barriers ✓ Provide assistance to system partners ✓ Help Board make connections

<ul style="list-style-type: none"> ✓ Review other workforce system plans ✓ Help remove barriers ✓ Support capacity building efforts for locals ✓ Implement advocacy strategy at federal level for WIA reauthorization <p><u>Innovation/Best Practices</u></p> <ul style="list-style-type: none"> ✓ Set investment priorities ✓ Determine criteria ✓ Approve investment plan ✓ Promote innovation philosophy <p><u>Quality Measures of Success& Performance</u></p> <ul style="list-style-type: none"> ✓ Set and define standards ✓ Develop compliance and reward policies ✓ Provide oversight ✓ Advocate with DOL for appropriate community-based performance standards <p><u>Administrative Excellence</u></p> <ul style="list-style-type: none"> ✓ Revise By-Laws ✓ Develop process for tracking and evaluation FY 2002-03 strategic plan ✓ Plan process for FY 2003-04 ✓ Update Board policies for capacity building, communications, consent calendar, etc. ✓ Monitor compliance with WIA requirements 	<ul style="list-style-type: none"> ✓ Promote capacity-building support for local WIBs, Youth Councils, One-Stops and practitioners ✓ Implement Interagency agreements with the Community Colleges and Department of Education ✓ Support federal advocacy efforts <p><u>Innovation/Best Practices</u></p> <ul style="list-style-type: none"> ✓ Develop investment plans and strategies ✓ Implement process ✓ Document successes/lessons and disseminate information ✓ Help leverage resources ✓ Guide provision of technical assistance ✓ Create innovation award program <p><u>Quality Measures of Success & Performance</u></p> <ul style="list-style-type: none"> ✓ Conduct research and disseminate information on best practices, integrate findings of WIA and other evaluations ✓ Assist with capacity building to implement new approaches ✓ Develop clear policies, assist with compliance monitoring, guide provision of technical assistance with EDD <p><u>Administrative Excellence</u></p> <ul style="list-style-type: none"> ✓ Support Strategic Planning process ✓ Support Board administrative functions including meeting, reporting and scheduling, including for Youth Council, Committees, workgroups, etc. ✓ Carry out administrative functions (fiscal, personnel, network administration, communications, etc.); develop consent calendar and items for calendar ✓ Ensure WIA compliance; integrate amendments to 5 year Plan ✓ Track and monitor legislation
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In addition, there is ongoing work of the State Board and staff that includes policy relationships. For example, Board leadership and staff are involved with national workforce development organizations and other large states on issues of common interest. This is of particular importance in the coming year with the pending reauthorization of the Workforce Investment Act.

Ongoing staff responsibilities include:

- Support for the full Board, the Youth Council, and all Board Committees and Workgroups
- Preparation of compliance documents and other reports, including legislative reports, and update of 5 Year Workforce Plan
- Coordination with EDD, the new Labor and Workforce Development Agency, and the Legislature
- Oversight of evaluation projects and innovation investment projects
- Participation on inter-agency workgroups
- Liaison with professional organizations such as the California Workforce Association, the California Association for Local Economic Development, and the County Welfare Directors Association

VI. APPENDICES

This document contains appendices that provide: a current listing of CalWIB Board members (1); a list of Youth Council, Committee and workgroup members (including affiliation) (2); a list of the 17 required WIA performance measures (3); and a description of the Performance-Based Accountability Process (4).